

Release from Liability

I, Bob Smith, agree to hold John Doe harmless from financial liability that may result from my decision to decline his advice to me and my immediate family regarding a Legacy Plan issued by Legacy Tree Foundation. I understand that John Doe has informed me that I can reduce or possibly eliminate the following taxes:

- **Income, capital gains and estate taxes**
- **3.8% Medicaid Surtax (effective January 1st, 2013)**

John Doe, has also advised me that a Legacy Plan from Legacy Tree Foundation, a 501 (c) (3) public charity would also give me and/or my family income for life or for a term or years and a structured inheritance for my heirs. At this time, Bob Smith, a client of John Doe, respectfully declines his Legacy Plan recommendation.

Sincerely

Bob Smith
Tuesday, October 01, 2013

